



## How to finalise a draft application

### What access do I need?

SP Site user role

### What else do I need?

Establish a relationship by linking the client to you in the HSO portal.

## Finalising a draft application

Before finalising a draft application, a relationship with the client must be established by linking the client to your site.

### Client Consent

#### Client Details

Eligibility Number  
Name  
Date of Birth  
Client Status  
The client's current  
Hearing Services  
Provider is

#### Transfer Client

This client has not yet given permission for you to see this record. Our records also indicate that the client has an existing relationship with another service provider.  
To continue, please ask the client to consent to share their information and to request a transfer to your service, and then certify below.

Transfer to Hearing Services Provider  
AUSTRALIAN HEARING SERVICES  
Site ID

Service Provider Trading Name  
Site Details  
Reason for transfer\*

I confirm I have written consent and authorisation to view and manage the client's details for the purpose of administering the Hearing Services Program.  
I confirm that the client or their power of attorney has authorised me to request a transfer from their existing Service Provider for the reason detailed above.

**Step 1** – To link a client to your site, click the **Client** accordion, and enter the four points of identification – eligibility/voucher number, given name, family name and date of birth.

**Step 2** - Tick the box to confirm the client has provided consent and this has been documented on the client file.

**Step 3** - Click **Confirm**, the client is now linked to your business. You will receive a message confirming the client's details have been changed. Select OK.

The client's details have been changed.

**Step 4** – Open the client's draft application by clicking on the **Client** accordion and entering their four points of identification in the **Find a client or application** fields and click the **Find** button.

**Step 5** - Review the statements and tick the box to indicate certification.

I certify I have entered the information as provided by the client.

**Step 6** - Click the **Process Application** button to finalise the application.

The client's eligibility will be confirmed at this stage.

Click the **Cancel Application** button if you do not wish to proceed.